



Date of Call: _____

“Thank you for calling BRZ Construction Group about your project! If you don't mind, I'd like to take a few minutes to ask you some questions which will help us get to know what you need.”

“First I'd like to get some basic information about you; what is your name? If you have a partner, what is that person's name?” [Another decision-maker?] “Your address (inc. zip)? Best number to reach you during the day?”, etc.

CUSTOMER INFORMATION

Name: _____ Partner/Spouse Name: _____

Address: _____ City: _____ ZIP: _____

Contact Phone: _____ Email Address _____

How did you hear about us? _____

TYPE OF PROJECT

_____ Bath (Master? Y / N) _____ Addition _____ Commercial

_____ Kitchen _____ New Home Construction _____ Remodel

_____ Other: _____

Project
Overview

How long have you owned your home? _____ How long do you plan to stay in your house? _____

Age of home? _____ How many decision maker(s)? _____

How long have you been thinking about this project? _____

Can you tell me what is wrong with what you have now (pain)? _____

Do you have any designs, pictures, a plot plan, etc? _____

What is your budget? _____ *"I'm asking because some people who call us are on a tight budget and others who call are comfortable spending whatever it takes because it's more about them being happy. I'm just trying to get a feel about where you fit."*

Are you interested in Financing? _____

Have you done any major remodeling before? Y / N

What kind of project/experience was that? _____

Who did the work? (Licensed Contractor, Handyman, Family Friend, Self, etc.) _____

Have you talked to any other professionals? Who? _____

What do you look for in a contractor? _____

What will your selection be based on? Design Quality Price Full service Design / Build

What is your desired construction start date? _____ Completion Date? _____

Who will be involved in the decision-making process?

What are you looking to accomplish at our first meeting? (If meeting has already taken place please skip)

“Is there anything else you would like me to know?”

I will be emailing you a bit of information for your review to take a look at before our meeting. Thanks again, I look forward to meeting with you!”

Address of Meeting(s) _____

